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The Mediterranean Energy Relations after the Arab Spring: Towards a New Regional Paradigm?

Nicolò Sartori

1 The Arab revolts, started in Tunisia at the end of 2010 and spread to the different Mediterranean countries in the following months, have introduced a series of dramatic political, socio-economic and security changes across the region. In Tunisia, Egypt and Libya the longstanding regimes led, respectively, by Zine El-Abidine Ben Ali, Hosni Mubarak and Muammar Gheddafi collapsed under the hammer-blows of the protesters. The transformation processes prompted by the protests, however, were not exempt from setbacks, as confirmed by the difficulties currently experimented by the new leaderships in consolidating their control over the countries and in leading them towards stable rule and prosperous socio-economic development.[1]

2 The trajectories of the protests spread across the region show great uncertainty about the nature, the powers, and the policy and strategic orientations of the new ruling elites in power on the southern shores of the Mediterranean. This undefined political situation risks to significantly impact on the future of the relations between North African countries and their European partners. Among the various sectors that could be affected by the new political processes triggered by the Arab uprisings, regional energy cooperation is certainly one of the most strategically relevant.

3 The regimes previously in power in North Africa had established strong and profitable bilateral energy relations with their key south European counterparts, which proved to be a fundamental enabler of longstanding political and socio-economic stability both on the northern and on the southern shores of the Mediterranean. The changes introduced by the Arab revolts, on the one hand, could modify the traditional intergovernmental relations, and establish new '*north-south*' cooperation models to deal with energy issues in the Mediterranean region. On the other hand these changes, by weakening historical regional ties, could favour the emergence of new international actors in the Mediterranean energy game.

4 Given these assumptions, the objective of this paper is not only to illustrate key aspects of the geopolitics of energy in the Mediterranean region and to analyse the main energy cooperation patterns, but also to assess the potential changes –either positive or negative– in the nature of the regional energy relationships triggered by the transformations introduced by the Arab upheavals. The fact that the revolts have so far produced uncertain and heterogeneous results in terms of political regimes, not resulting in a more free, democratic and prosperous Mediterranean region as expected at the beginning of the revolts, makes this assessment particularly difficult and indeterminate.

Energy fundamentals in the Mediterranean

5 From a methodological point of view, the paper intentionally focuses on the energy relations between Europe and North African Mediterranean countries. This choice excludes Eastern Mediterranean and Levant states from the analysis, as at present they are not relevant energy partners for the EU.

6 The Mediterranean region is an important energy area for two main reasons. First, the Mediterranean Sea is a key transit area for oil and gas supplies that from the Middle East, Russia and the Caspian reach European ports as well as the US market. Second, it is fundamental for intra-regional trade of hydrocarbons between North African producers and South EU consumers.[2]

7 Every year, thousands of laden of oil cargoes and liquefied natural gas (LNG) tankers transit across the Mediterranean and its key chokepoints: the Suez Canal and the Turkish straits. In 2012, about 2.97 million barrels per day (b/d) of total oil (including crude oil and refined products) crossed the Suez Canal transiting both northward and southward. It represents the highest amount of oil supplies ever shipped through the Canal, making up around 7 percent of World's seaborne traded oil. The majority of the oil –1.66 million b/d– was sent northbound from the Persian Gulf towards European and North American markets, while the remainder –around 1.32 million b/d– was Eurasian oil delivered southbound mainly toward Asian markets. In 2012, southbound trade increased by over 500,000 b/d compared to the previous year, mainly due to resumed oil production in Libya after the civil war. In addition to oil, LNG trade represents an important portion of ships transit through the canal. Indeed, northbound LNG flows increased from 8.8 billion cubic meters (Bcm) per year in 2008 to 35 Bcm/y in 2012.[3] As for the Bosporus and the Dardanelles, in 2013 approximately 3.0 million b/d flowed through the two Turkish straits. Oil shipments through the Turkish Straits reached their peak of over 3.4 million b/d in 2004, then starting to decrease due to Russia's decision to shift crude oil exports toward the Baltic ports and to the activation of the Baku-Tbilisi-Ceyhan pipeline, which started delivering part of the Caspian to the Mediterranean bypassing the straits.[4]

8 Despite these significant data, due to the unconventional energy revolution in place in North America and to the impressive growth of hydrocarbons consumption in East Asia, the role of the Mediterranean as a transit region –though remaining critical in terms of maritime security and environmental protection– is expected to progressively decrease. The Mediterranean, in this context, will not play anymore a global role, while it is expected to assume a regional relevance mainly for European consumers.

9 The Mediterranean, however, will remain fundamental for the intra-regional supply of hydrocarbons. In fact, three out of the five North African countries considered in this paper –Algeria, Libya and Egypt– are net energy exporters, and their oil and gas production plays a significant role for European countries, particularly for those facing the Mediterranean Sea.[5] Algeria is a world-class gas player. Owning about 4.5 trillion cubic meters (Tcm) of gas, Algeria is the ninth country in terms of reserves and the tenth in terms of production, which in 2012 reached an output of 81.5 Bcm. Algeria contributes to roughly 15% of total EU gas imports, and to 50% of Portugal's, 41% of Spain's, 23% of Italy's and 11% of France's external supplies. Before the recent political chaos, Libya, for its part, was a relevant oil exporter, holding the ninth oil reserve capacity in the World (48 thousand million barrels) and providing around 10% of total EU oil imports. While the country is not a major player in terms of gas production and exports –contributing to only 3% of total EU imports– it plays a significant role for the energy security of Italy, to which it provides around 10% of its total consumption. Finally Egypt, that despite significant hydrocarbons production, due to huge domestic consumption today contributes only marginally to Europe's energy sector providing LNG volumes. In addition, these three countries ensure energy supplies to their African and Middle Eastern neighbours: Algeria, indeed, exports gas to Morocco and Tunisia, while Egypt gas volumes reach the Levant countries –Israel, Palestine, Jordan and Lebanon– through the Arab Gas pipeline.

European external energy action

10 The high level of dependence of Southern European countries on North African energy resources is fundamental to explain the nature of the Euro-Mediterranean energy relations. Together with Norway and Russia, the Mediterranean is one of the three key axes of the European external energy policy, in particular in the natural gas sector.[6]

11 In general, the EU has demonstrated a limited capacity to engage these energy actors. Single EU Member States, on the contrary, have developed strong bilateral ties with these strategic partners. The provisions of Art. 194 of the Lisbon Treaty, indeed, envisage shared competences between the EU and its Member States in the energy domain, allowing national governments to protect their own interests. This situation contributes to reduce the cohesion and effectiveness of the EU action in this field, which varies also according to the specificities of each energy partnership.[7]

12 Russia and Norway are by large the main energy suppliers of the EU, jointly accounting to 65% of Europe's gas imports and 50% of its oil imports. Nine different EU countries, including all the major European consumers (Germany, the UK, Italy, the Netherlands and France), import gas from Norway, while eighteen of them are consume Russian gas. [8] With Norway the EU has developed strong and efficient bilateral energy relations that integrate several cooperative processes and frameworks in which the Nordic country is involved. While Norway is not member of the EU, in fact, it shares about 75% of European legislation through its association in the European Economic Area, Schengen Agreement, and European Free Trade Association. Also in the case of Russia, despite the complex political relations between Moscow and its European countries, the strong energy interdependence between the parties favoured the establishment of various institutional energy cooperation mechanisms such as the EU-Russia Energy Dialogue, the Early Warning Mechanism and joint structures and programs to manage energy

relations. Finally, in order to diversify its energy sources, the EU launched a common external energy policy initiative towards an emerging energy region such as the Caspian. Taking advantage of the vacuum of power that followed the collapse of the Soviet Union, the EU has tried to develop a coherent cooperative approach with the Caspian producers (Azerbaijan *in primis*). The launch of the INOGATE program and of the Baku Initiative, as well as the development of the Southern Gas Corridor are all initiatives that witness the proactive –though not always fully successful– energy role of the EU in the region.[9]

13 The situation appears different when it comes to EU energy relations with Mediterranean countries. As noticed above, indeed, the Mediterranean is not the predominant geographical priority of the EU's energy endeavours, and the cooperative schemes launched by the European Union towards the region appear more limited. This situation has two main explanations. First, because Mediterranean hydrocarbons supplies have a limited impact on Europe's overall energy security compared to Russia and Norway, and their relevance can be circumscribed to three main countries: Italy, Spain and Portugal. Second, due to historical bilateral country-to-country energy ties, as those developed by Italy in North Africa starting from the '50s. In that period, energy was regarded as a fundamental element in the bilateral relations established across the Mediterranean. The action of the Italian energy company ENI and its Chairman Enrico Mattei is a case in point: while Mattei became famous for the 75-25% contractual formula introduced in Iran in 1957, in reality, the first exploration and production activity of the company in the Arab world started in 1954 in Egypt.[10]

14 The peculiar nature of energy relations in the Mediterranean is strongly rooted in the energy needs of both the North African exporters and the South European consumers.

15 Energy exporters depended almost completely on hydrocarbons revenues to remain in power and to ensure socio-economic stability. This condition encouraged the authoritarian regimes of these countries to strengthen their longstanding bilateral ties with traditional South European customers in order to secure and maximize energy export profits. As an alternative, these governments could choose to develop closer energy relations with the EU. However, this option could significantly impact on the behaviours and policies of these regimes. In fact, the EU often includes human rights and democracy clauses in partnership and cooperation agreements with third countries, as an attempt to promote and transmit the values of human rights, democracy, and the rule of law globally.[11] As North African producers need stability and predictability in their energy relations –in order to avoid exports and prices volatility, to ensure stable cash flow, and to plan socio-economic and redistribution policies for their citizens– in case of restrictive clauses imposed at the European level, they generally prefer to engage with less demanding energy customers.

16 From the perspective of south European importers, the strong dependence on Mediterranean energy supplies encouraged governments to maintain, and possibly strengthen, their privileged energy partnerships with North African producers. These historically established energy relations narrow the present and future options for external energy policy and lead to conflicting preferences.[12] In this context, the southern members of the EU are sceptical about pan-European initiatives that could weaken country-to-country cooperation.

17 Art. 194 of the Lisbon Treaty, establishing that EU policies "do not affect a Member State's right to determine the conditions for exploiting its energy resources, its choice

between different energy sources and the general structure of its energy supply" in fact defends the willingness of EU countries to maintain sovereignty over their national energy policies.[13] These policies are often the result of different historic trajectories developing out of national specificities, including domestic resources, geographical location, domestic demand, infrastructure investments, and public opinion, which make it extremely difficult for EU countries to converge on substantive energy objectives. While the Commission is pushing Member States to operationalize the principle of solidarity in the energy domain, the primacy of national energy strategies at the member state level still represents a decisive obstacle for all efforts to forge a external energy action at the EU level.

Energy cooperation in the Mediterranean

18 The combination of these approaches resulted in limited initiatives at the EU level to engage Mediterranean countries on energy issues. The first attempts date back to 1972, when the European Commission tried to integrate development concerns into existing economic ties with some Mediterranean countries. European efforts resulted in the Global Mediterranean Policy, launched in 1976 to institutionalize relations with Mediterranean governments, mainly on general economic and commercial issues.[14] The success of the initiative, however, was limited and with advances in European integration Mediterranean partners remained substantially marginalized from cooperation processes.[15]

19 More than twenty years after the Global Mediterranean Policy, the EU launched the Barcelona Process (1995) and the Euro-Mediterranean Partnership (EMP), through which it tried to develop a multilateral approach towards the region. The EMP covered three macro-themes: political and security dialogue, economic and financial partnerships and socio-cultural partnerships.[16] Initiatives on the different policy areas were envisaged to take place on two levels –bilateral and multilateral. In 2007, the Ministers of Energy of the Euro-Mediterranean Partnership, taking part in the fifth Euro-Mediterranean Ministerial Conference on Energy, held in Limassol, launched the Euro-Mediterranean Energy Cooperation.[17] The Declaration included a Priority Action Plan for Euro-Mediterranean Energy Cooperation, which identified three priority areas for the period 2008-2013:

- Ensuring the improved harmonization of energy markets and legislations and pursuing the integration of energy markets in the Euro-Mediterranean region;
- Promoting sustainable development in the energy sector;
- Developing initiatives of common interest in key areas, such as infrastructure extension, investment financing and research and development.[18]

20 Despite the emphasis posed during the conference, the proposals remained largely confined at the declaratory level.

21 In 2008 the Union for the Mediterranean (UfM) re-launched the idea of a multilateral commitment, but into an intergovernmental framework based on the principles of co-ownership and variable architectures, and maintaining the legitimate interests of any member of the UfM.[19] From the beginning, energy cooperation was put at the core of the UfM initiative: indeed, alternative energies –and in particular the Mediterranean Solar Plan (MSP)– was among the six priority areas identified in the final declaration of the Paris Summit of July 2008. The MSP is a very ambitious initiative, expected to

ensure 20 GW of new installed electricity capacity by 2020. The UfM Secretariat in Barcelona has been tasked to act as a key facilitator for the process, setting up common working platforms involving the main institutional and private stakeholders (i.e. Member States, European Commission, international organizations, financial institutions, private companies, and civil society).[20] The status of advancement of the initiative remains today quite uncertain, and despite the direct involvement of the European Commission through the project 'Paving the Way for the Mediterranean Solar Plan' (PWMSP), the milestones identified by the medium term roadmap are far from being achieved due to disagreement among the UfM members. The status of the MSP Master Plan addressing the key details of the project[21], to be submitted by mid-2013 and not yet presented, is a case in point of such delays.

22 In parallel, energy cooperation in the Mediterranean was developed through the European Neighborhood Policy (ENP), which –contrarily to the EMP– put strong emphasis on bilateral cooperation between the EU and single Mediterranean countries. [22] The ENP framework was shaped on the basis of the approach adopted with candidate countries prior to the 2004 enlargement, and introduced the possibility for differentiating relations with partner countries. It envisages specific incentives based on the progress towards commonly established benchmarks on policies of common interest.[23] The tool developed by the EU to foster the dialogue and put forward cooperative programs with its neighbours is the *Action Plan*. *Action Plans* are expected to set out the agenda for political and economic reforms in partner countries, defining short and medium-term priorities of 3 to 5 years. In the ENP framework energy cooperation is basically framed along the three traditional priorities of the EU energy policy: competitiveness and market integration, sustainability, and security of supply. While energy cooperation is given an increasingly importance status in the ENP *Action Plans*, in reality the content of these documents tends to be vague, listing only general goals and aspirations, but without providing the practical procedures and mechanisms to ensure their actual implementation.

23 In the specific case of North African neighbours, the EU has signed bilateral *Action Plans* with Egypt, Morocco and Tunisia. Cooperation with Egypt, in particular, is aimed at enhancing cooperation in the energy sector through: energy policy exchanges, the gradual convergence towards the principles of the EU internal electricity and gas markets, the development of energy networks including facilitation of natural gas transportation between Egypt and the EU via the Arab gas pipeline, regional cooperation, and enhancing energy efficiency and the use of renewable energy as well as cooperation in the oil and gas industry.[24] Quite significantly, however, the limits of the ENP approach are witnessed by the fact that the two key energy exporters of the region –Algeria and Libya– have not yet agreed an *Action Plan* with the EU, and thus energy cooperation with these countries remains out of the ENP framework.

The bottom-up cooperation between the EU and Mediterranean countries

24 As strategic engagement and ambitious cooperation plans failed to deliver tangible results, the EU is currently trying to develop a more pragmatic bottom-up approach.[25] This effort covers a wide range of issues, ranging from energy legislation and regulatory approaches –thereby facilitating foreign investments– to energy security

and efficiency. The aim of these is to engage neighbouring countries at the regulatory and technical level, in order to encourage them to harmonize their procedures with EU's internal energy market rules. Significantly, also the two main regional energy producers, Algeria and Libya, participate to these initiatives.

25 The Association of Mediterranean Energy Regulators (MedReg), started in 2006 as a voluntary working group to foster cooperation among regional electricity and gas regulators, is certainly the most successful example of regional energy cooperation. MedReg became a permanent organisation in 2007, thanks also to the support of the European Union, which financially sustains the association and contributes to fund its activities through DG Energy and DG Development and Cooperation.

> MedReg promotes a transparent, stable and harmonized regulatory framework in the Mediterranean Region fostering market integration and infrastructure investments, as well as aiming to consumer protection and enhanced energy cooperation. MedReg carries out its activities through a well structured and effective internal cooperation process and external collaboration with energy stakeholders in the Mediterranean Basin, with the objective to implement the conditions for the establishment of a future Mediterranean Energy Community, based on a bottom-up approach.[26]

26 Thanks to the experience gained with MedReg in 2012 the Commission decided to launch Med-TSO, a platform to coordinate the activities of Mediterranean transmission system operators.[27] Med-TSO is expected to coordinate the development plans and the operation of the grids in Mediterranean countries, and to encourage the integration of their electricity systems and the implementation of common criteria and harmonized, transparent and non-discriminatory rules of access to and usage of grids. Coordination with the EU is ensured by a direct link with the European Network of Transmission System Operators for Electricity (ENTSO-E), while in order to speed up the integration of the regional electricity market, Med-TSO works closely also with MedReg.

27 In October 2013 the cooperation between the two regional associations gave its first results, as MedReg and Med-TSO signed an agreement aimed at promoting a shared vision to integrate Mediterranean electrical markets. The institutional partnership is expected to foster coordinated transmission rules on a regional level, to promote the synergic development of electricity infrastructures, and to boost technical cooperation in critical areas such as security and quality. Cooperation to harmonize rules to coordinate Mediterranean electrical markets can be extended to other relevant partners, in order to develop an inclusive and unified approach to confront the region's challenges in the energy sector.[28] In this context, MedReg and Med-TSO cooperate with the European Commission and UfM to promote multilateral cooperation in the Mediterranean region aimed at integrating regional energy systems.

28 Other relevant institutional initiatives include EU projects aimed at enhancing regional cooperation on these topics. MED-ENEC, a EU-funded project on Energy Efficiency in the Construction Sector[29], and MED-EMIP, a project supporting the Enhanced Integration and the Improved Security of the Euro-Mediterranean Energy Market.[30] Contrarily to MedReg and Med-TSO, these projects do not directly involve public stakeholders, and their practical results are so far more limited.

29 These institutional initiatives are integrated by complementary efforts put in place at the industrial level. The most relevant of these is Medgrid, created in 2010 by a group of utilities, grid operators and equipment makers,[31] with the target of carrying out a feasibility study of the development of a grid aimed at connecting Europe to North

African solar electricity producers. New interconnectors are needed throughout the Mediterranean region to facilitate large-scale electricity trading between the north and south, in addition to inter-grid trading throughout the region. To address this need, the Medgrid industrial initiative was set up to design and promote a Mediterranean transmission network capable of transporting 5 GW of electricity to Europe and to provide tools to assess infrastructure projects. The project is closely connected to the realization of the MSP, whose implementation delays are somehow frustrating also advancements of Medgrid initiatives.[32]

30 The results achieved by these bottom-up initiatives, the EU started considering the possibility to extend the normative framework of the Energy Community also to its Mediterranean partners.[33] In practice, this process would attempt to extend the EU internal energy policy and to create a stable regulatory and market framework beyond South East Europe, including also North African countries.[34] This would be a very ambitious objective for the EU, also considering the gradual approach and the limited results obtained by the Energy Community so far. However, the current risks to energy security that the EU has to face, the need of North African countries to modify their traditional energy consumption patterns, and the potential windows of opportunity opened by the change of leadership in these countries encouraged the EU to explore this possibility.

Changing cooperation patterns after the Arab uprisings?

31 So far, the political outcomes resulted from the uprisings appear too limited and heterogeneous to imagine a radical change in the traditional energy dynamics in the Mediterranean. The emergence of a space of democracy, economic development and social inclusion foreseen during and in the immediate aftermath of the uprisings has not yet materialized. Rather, in the main energy producing countries the revolts have produced questionable and significantly different results.

32 In Egypt, the results of the revolts –which ended in the electoral process that put Morsi in power as President in 2012– were reversed by the counter-revolution erupted on June 2013. Encouraged by protesters calling for Morsi's resignation, at the beginning of July a military coup led by Defence Minister Abdul Fatah al-Sisi declared the president unseated, determining a political vacuum filled by the military-backed *interim* government of Prime Minister Hazem el-Beblawi. While the country's energy sector stability has emerged as one of the more pressing challenges in the period after the revolts, due to the priority internal stability issues –in the last year the Egyptian government could do little to establish an effective energy policy action, both internally and externally.

33 In Libya the situation is even worse. After the 2011 civil war and the death of Colonel Gheddafi and the liberation of the country announced by the National Transitional Council in October of the same year, the situation in Libya is still critical, due to insurgency led by former Gheddafi loyalists, continuous threats of secession by Cyrenaica authorities, and clashes between clans for the control of specific areas or economic activities. While after Colonel Gheddafi's defeat analysts expected the country to largely expand its hydrocarbon production, in reality since 2011 the government is struggling to ensure unity and stability. Uncertainty and security

concerns affect also the energy sector –in 2013 both gas exports and crude trade were blocked for security reasons– preventing the government to develop new coherent strategies in the energy domain.

34 Contrarily to Egypt and Libya, in Algeria the revolts did produce neither significant political changes, nor major instability and security concerns. In terms of political structure, indeed, Algeria is the North African country to have undergone the least change in the past few years. However, the fact that the Algerian regime survived this wave of revolts does not mean that it is intrinsically strong and stable. In fact, the regime led by President Bouteflika is particularly concerned by the situation of instability in neighbouring Libya, which could set a precedent for Algerian protesters, but also create chaos in the region and result in further tribal secession demands on its soil. In general, the necessity to face these challenges and to ensure the continuity of the regime through energy revenues has encouraged the Algerian government to maintain its traditional energy policies.

35 The political conditions emerged after the Arab revolts certainly do not represent the best environment for the EU to shape new forms of energy dialogue in the Mediterranean. However, contextualizing the situation in the broader regional trends, it is possible to envisage some room for deepening the energy relations between the EU and its North African partners. In the current transition phase, North African countries urgently need to find a new path of strong and sustainable socio-economic development, necessary to respond to the changes invoked by the population. Energy is a fundamental factor to respond to this challenge, as it affects the main macroeconomic parameters of the countries, including fiscal balances and poverty trends.[35]

36 The picture is characterised by a rapid increase of energy demand, low energy efficiency and low domestic energy prices due to large subsidies on energy consumption. Due to rapid population growth, urbanisation and economic growth, these countries are "under strong pressure to increase investment in new energy facilities as well as finance costly energy subsidies. In short, the current energy situation does not appear sustainable and poses several risks to the prospects of socio-economic development of the region".[36] The current situation in Egypt is a case in point: with declining gas production and energy subsidies that account to up a fifth of the budget, the government has been forced to import for the first time coal to help power the struggling concrete industry as well as to raise prices for home use of natural gas, in some cases quadrupling its cost to the citizens.[37] Given these conditions, a reform of the energy sectors in these countries –both source of necessary income and of socio-economic inequalities– is urgent, in particular in view of the future economic and demographic regional trends.

37 In this context, the EU represents the best partner to work with in order to launch sectorial reforms that should address policy planning, legal and regulatory design, infrastructure development, and technological transfers. Due to the strong complementarities and the proximity of the markets, closer Mediterranean cooperation in this domain provides important dividends to both the EU and its regional partners, as far as energy security, sustainable development, economic growth and job creation are concerned. The results reached by bottom-up Euro-Mediterranean cooperation show this approach may represent an important option to achieve these objectives.

38 Despite these possible virtuous evolutions, the political changes in the region may also represent a significant challenge for the EU. At the theoretical level, the new leaderships could be tempted to explore other forms of energy cooperation with new international partners. In this context of increasing *overture*, global energy players such as the US, China, Russia, Brazil and the Gulf countries could take the opportunity to establish closer partnership in the region. This argument became particularly popular during the 2011 military intervention in Libya to overturn Col. Gheddafi, which was justified by part of the public opinion as a move to open the country's energy sector to international energy companies.[38] In reality, due to the political and security concerns mentioned above, this situation has not yet materialized and those countries with traditional experience in Libya still remain key actors in its energy sectors.

39 More than the effects of the Arab uprisings, also in this case is the regional energy context that may play a significant role in the evolution of the Mediterranean relations. Algeria, the least affected by the political changes occurred in North Africa, is a case in point. The Algerian government, indeed, is intensively attempting to diversify its exports options to cope with the declining energy demand in the EU markets. The regime has clearly expressed its interest in exploring new markets, and started considering to expand LNG sales in Asia –where spot prices are significantly higher than in Europe– and South America.[39]

40 In conclusion, given the current situation in North Africa, it is rather difficult to expect the sole outcomes of the Arab uprisings to play a major role in determining significant transformations in the regional energy relations. However, considering the emerging energy trends at the national, regional and global level, some of the political and social processes activated by the revolts may contribute to mutate the traditional cooperation paradigms. In this evolving context, the EU could take the opportunity to deepen its energy dialogue with these countries and strengthen its energy security policies. However, if not played with coherence and supported by its Member States, such leading role in the region may be challenged by the potential emergence of new international energy competitors in the Mediterranean space.

NOTES

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ABSTRACTS

The revolts spread across the Mediterranean region between 2010 and 2011, have introduced a series of political, socio-economic and security changes that could impact on the nature of energy relations in the region. During the last decades, indeed, regional energy cooperation has been based on strong bilateral ties between the regimes in place in energy producing countries and a limited group of southern European states, leaving limited room for the active engagement of the EU in this domain. While so far the changes triggered by the protests have had partial impact on the traditional intergovernmental energy cooperation models in place in the Mediterranean –if coupled with energy trends emerging at the national, regional and global level– they could eventually contribute to create a new energy paradigm in the region.

Les révoltes se sont diffusées à travers l'aire méditerranéenne entre 2010 et 2011 ont introduit une série de changements politiques, socio-économiques et sécuritaires qui ont pu avoir un impact sur la nature des relations énergétiques dans la région. Au cours des dernières décennies, la coopération énergétique régionale a été basée sur des liens bilatéraux forts entre les régimes en place dans les pays producteurs d'énergie et un petit groupe d'États du Sud de l'Europe, qui ont laissé peu de place à un engagement actif de l'Union européenne dans ce domaine. Alors que jusqu'à présent, les changements déclenchés par les révoltes ont eu un certain impact sur les modèles intergouvernementaux traditionnels de coopération énergétique en usage en Méditerranée – s'ils étaient couplés avec les tendances émergentes au niveau national, régional

et global –, ils pourraient en définitive contribuer à créer un nouveau modèle énergétique dans la région.

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